

THANKS TO OUR BOARD AND VOLUNTEERS FOR THEIR SUPPORT AND ENCOURAGEMENT IN 2002

Board of Directors

Brian Babcock, Ann-Louise Branscombe (Vice-Chair), Pat Darte (Secretary), Brad Hutchings, Sean Jackson, Andrea Kriluck (Treasurer), Paul Leon, Victor Muratori, Robert Neill, John Palumbo, Stan Pettit, John Potts (Chair), Betty-Lou Souter, Norris Walker, Frank Branscombe – Honorary Chair, Regional Chair Debbie Zimmerman – Honorary Patron

Volunteers

Martha Abra, Frank Adamson, Dr. David Atkinson, Bill Amadio, Ed Arnold, Jocelyn Baker, Dean Bell, Dennis Bell, Randy Boyce, Peter Brown, Jason Burgess, Steve Butz, Rebecca Cann, Christine Clark, Bernadette Corbin, Rob Diermair, Greg de Prinse, Manfred Fast, Bill Finley, Tim Foster, Derek Fretz, Mel Groom, Rick Hatt, Laura Hills, Yvonne Hopkins, Steve Hudson, Anne Kemp, Bill King, Dan McDonell, Rosanne Marsh, Rick Mauro, Terry McDougall, Jay Merrin, Paul Montgomery, Dave Morgan, Ernie Morgan, Darrell Neufeld, Gary Niven, Larry Oates, Steve O'Brien, Ted Palmer, Dr. Andy Panko, Peter Papp, Andrew Paterson, Dan Patterson, Michael Philbrick, Mary Rashleigh, John Rednall, Jennifer Ricci, Andrea Sinclair, Sandra Skog, Sonya Smith, Wade Stayzer, Laura Stones, Carol Stymiest, Donald J. Taliano

St. Catharines Community Fund Advisory Board and Volunteers

Rosemary Auld, Linda Bramble, Roy Cairns, Frank Caplan, Harry Daniel, Rosalyn Hatch, David Howes, Vicki Little, Ron Matsushita, Peter Partridge Jr., Bob Ruttan, Mark Sherk, Paul Speck, Doug Whyte, Don Wiley

Welland Community Fund Advisors

Gordon Burnett, Albert Iannantuono, Paul Leon, Allan Root

HOME FOR HISTORY

Slipping over the QEW on Ontario St. in St. Catharines, the glow of car dealerships and franchise eateries fades and you come upon the fuzzy grey of old forest and a displaced brick house standing quietly defiant on the left.

This is Mayholme, the house where Corlene Taylor was born. It was first built in 1858 for her grandmother to be born in. And now Taylor aims to give birth to something else in the old place.

She and her 'kissing-cousin', Shirley Kamen-Smith, are slowly transforming the scads of genealogical information stored in the house into the Mayholme Foundation, which they hope will help people uncover their roots and forge a personal link with the past.

The Mayholme Foundation was officially born this fall when Corlene set up a fund through the Niagara Community Foundation, using inheritance money from the woman she was named after, her Aunt Corelene (Beyer) Tostevin, an English teacher who was always there to edit her schoolwork and encourage her interest in history.

Eventually Corlene hopes the charitable organization will be a place where people can stop in to do research or get advice on hunting down their ancestors. She also hopes the foundation one day will act as a centerpiece for regional genealogy by hosting exhibits, lectures and seminars.

Right now the foundation is looking at getting renovations to the house, before deciding the exact direction they wish to head in. At the same time, Corlene is busy trying to get heritage status for Mayholme. The foundation is her focus, hoping her legacy will enable other people to see the same Niagara she sees.



Corlene Taylor in front of Mayholme, built in 1885.

Reprinted with permission of The Standard. Excerpt from article written by Erik White. Photo credit Denis Cahill.

For further information on the Foundation, please call Liz Palmieri, Executive Director at (905) 684-8688 or visit our website at

www.niagaracommunityfoundation.org

17 Queen Street, 3rd Flr, St. Catharines, ON L2R 5G5

email: n cf@becon.org

Designed and produced by Alderson, Caters & Hardy Inc.



PRESIDENT'S MESSAGE

Board President, John Potts

It's hard to believe that we are heading into our third year as a community foundation. And what a spectacular six months we have just completed.

Some of the highlights include:

- Receiving a gift of \$750,000 from Casino Niagara Cares
- Obtaining over \$1.9 million in endowed funds since our launch
- Opening five new endowment funds
- Awarding \$31,000 in grants to 41 organizations
- Launching a new Environmental Grant Program

In 2003 we plan to build on our success to date and will be focusing our efforts on communicating to our various constituents about how the foundation can be utilized to build strong and vibrant communities. We plan to promote the resources available at the foundation to Niagara's professional advisors and charities. We will be developing educational partnerships and are publishing *Creating a Giving Program: A Guide for Small and Mid Size Businesses*. The booklet will help the business community develop strategic community investment programs.

All the best in 2003 and thanks to all our donors and our 85 volunteers for their support in 2002.

John Potts
Board President

NIAGARA COMMUNITY FOUNDATION

COMMUNIQUE

A publication of Niagara Community Foundation – January 2003

Kristen Leads the Way



In October we received a letter from eight year-old Kristen Peacock. She had read about our partnership with the Niagara Newspaper Network to launch a Children's Summer Camp Fund and wanted to help out in her own way. Kristen spends her free time as a proud member of the 1st Jordan Brownies. She is also a junior dragster driver and during the year she shows and races her car. Here's what Kristen wrote in her letter.

"I think my race car would be a neat way to help raise money for camp. My car attracts a lot of attention when we show or race it. I can use that time to tell people how much I love camp and how important it is that every kid who wants to go should have a chance. I hope I can help."

Since the middle of November she has raised over \$300 for our 2003 Summer Camp Fund. We often read about the generosity of adults but here is a young person who understands the impact of philanthropy on her community – young people in financial need. We've asked her to bring her dragster to our annual celebration in May so we will all have a chance to thank her personally.

Thank you Kristen. The funds you've raised so far will send three children to camp this coming summer.

If you are interested in donating to the camp fund, please send your gift to the foundation (our address is on the back of the newsletter).

CASINO NIAGARA CARES

Early in October, Casino Niagara announced a \$750,000 donation to the foundation for the creation of a permanent endowment fund. "The Casino Niagara Cares Fund will be used for the long term benefit of the Niagara community," said Ron D. Barbaro, chairman and CEO of the Ontario Lottery and Gaming Commission. "Since the very beginning the OLGC has been committed to ensuring that the casino has a positive and lasting impact on the region – an impact that goes beyond the obvious tourism and business opportunities to support and nurture the region's unique communities and institutions."

This fund, which will be built over five years, will form part of the foundation's Community Fund. The foundation's grants committee will work with the Casino on an annual basis to select projects to support.

"The Niagara Community Foundation fits perfectly with the Casino Niagara Cares program," said Jay Meilstrup, the casino's general manager. "Both have a mandate to strengthen the communities of the Niagara region and to improve the quality of life for as many of its citizens as possible."

FUNDS OPENED TO DATE

Since our launch, 27 funds were created at the Foundation. We met with each donor to determine the type of fund most appropriate to his or her philanthropic intent. Thanks to our donors for creating a fund with the Foundation as a permanent legacy. The funds raised to date total \$1.9 million.

Community Fund

A donation to this fund gives the Foundation the greatest flexibility. The earnings on this fund enable our Board of Directors to respond to current community needs through the provision of grants to charities throughout the Niagara Region. Donors can establish a named fund within our Community Fund with a \$5,000 gift.

- Alice Helen Downie Bacon Fund
- Branscombe Families Fund
- Crawford, Smith and Swallow Fund
- Casino Niagara Cares Fund
- Jan and John Potts Fund
- Niagara Credit Union Fund
- Waters & Meredith Fund

Donor Designated Funds

This type of fund gives donors the opportunity to specify, at the time the fund is established, which particular charities they would like to support in perpetuity. If unexpectedly, an organization

ceases to exist, we can redirect the funds to a similar cause. The minimum donation to open a designated fund is \$10,000 per beneficiary.

- Alice Helen Downie Bacon Education Fund
- Anita Skinner Fund
- Church of the Transfiguration Education Fund
- Joan E. Marlow Memorial Fund
- Luigi and Amalia Setacci Fund
- Mayholme Foundation Fund
- Morabito Family Fund

Donor Advised Funds

This fund enables donors to have ongoing participation in the selection of charities that will benefit from their gift. Donors may choose this type of fund instead of creating a family trust or private foundation. The minimum donation to open a donor-advised fund is \$25,000

- Donald and Barbara Fraser Family Fund
- Sunday in the Parks Fund
- Morgan Funeral Home Community Fund
- Niagara Road Supervisors Fund

Field of Interest Funds

These funds work much like our Community Fund, except that donors identify an area of interest that they would like to target

their support. The minimum donation to open a donor-advised fund is \$25,000.

- Environment Endowment Fund
- Ontario Endowment for Children and Youth in Recreation

Charitable Endowment Funds

These funds are created and administered by the Foundation on behalf of registered charities. This allows the organization freedom from investment responsibility and gives donors the confidence of knowing that a permanent foundation is in place to professionally administer the charity's endowment. Once established, the charity can encourage their donors to contribute to their endowment fund. A donation of \$10,000 opens this fund.

- Niagara-on-the-Lake Library – Michael Dietsch Family Fund
- Niagara Survivor Services Fund

Local Community Funds or Affiliates

These funds support the work of charities operating within a particular Niagara municipality and operate much like our Community Fund identified above. The minimum donation to open this type of fund is \$25,000.

- St. Catharines Community Fund
- Welland Community Fund

2002 COMMUNITY GRANTS

Business Education Council of Niagara

Teen Esteem: The Lunch Bunch – a lunch hour program to girls in grades 6-8 to promote educational, career and life choices by modeling and encouraging positive behaviour and self-awareness for young women (\$3,000)

Carousel Players

Carousel Players Studio Theatre Project – to support equipment necessary to create a 150 seat theatre in the Old Court House building in St. Catharines (\$1,700)

Family and Children's Services

Corporate Identity Program for Foundation - to assist the FACS Foundation to build public awareness and develop a unique and distinctive image in the community (\$1,500)

Fort Erie Public Library

Fort Erie Library Teen Space – to create a designated area within the library especially for teens – this project was designed and developed with input from the library's teen advisory group (\$1,500)

Information Niagara

Capacity Building through Accreditation – to provide staffing assistance as the organization becomes accredited by InformOntario in order to meet required 211 service standards - 211 is the telephone number residents will be able to call to get information on and referral to any community and government service (\$3,000)

Niagara Historical Society & Museum

Museum Outreach Program – to support the museum's 'Bring the Museum to the People' program that targets school children in Grade 3 (\$1,000)

Osteoporosis Society of Canada, Niagara Chapter

Osteoporosis Health Promotion and Information Display - to expand current local community-based education and service programs through the acquisition and use of a portable health awareness display (\$500)

Project S.H.A.R.E.

Software/Employee Training – to purchase new accounting and volunteer management software and to train staff and volunteers in use (\$1,000)

Rodman Halls Arts Centre

Youth in Niagara Gallery – to develop the curatorial aspects related to formal exhibits dedicated to artwork produced by youth (\$1,000)

Theatre Beyond Words

Mask Festival and Exhibit – to support one week of performances, workshops and demonstrations of mask theatre and an exhibition of masks from around the world (exhibits in Fort Erie and Niagara Falls) (\$800)



Volunteers at launch of BEC Teen Esteem: The Lunch Bunch Program

ASK YOURSELF THESE QUESTIONS...

Are you making charitable gifts now that you would like to continue after your death?

Do you think that your children would mind if you decided to leave 90% of your estate to your family and to give 10% of your estate to your favorite charities?

Would you like to discuss with your financial advisor how to try to make your money work better for you in your retirement while also providing for organizations that are important to you?

Have you considered what would happen to your assets if your spouse or children do not survive you? Would you like any of your assets passed on to a charity, rather than to a distant relative or the government?

Are you unmarried, married without children, married with independent children, a widow or widower?

Are there any charitable or community needs you would like to consider supporting during your lifetime or through your estate?

If you answered yes to any of these questions, we recommend that you arrange to meet with your financial advisor or estate planner to discuss how to create an innovative, comprehensive financial plan that takes care of your family and friends, avoids taxes and reflects your values. Many people who are confronted with the task of transferring assets from one generation to another are increasingly choosing to integrate charitable giving into their planning to realize personal as well as financial benefits. The Foundation staff are available to work with your advisor in helping to put together a plan to support your favorite charities in perpetuity.